

Individual Client Questionnaire

Full Name: _____

Is there more than one return? Yes No

Did you buy or sell property in 2020? If yes, we need closing documents. Yes No

Did you buy a vehicle last year? Yes No

Did you receive health insurance through the government marketplace? Yes No

Did you have any monetary charitable contributions? Yes No

Did you buy or sell any virtual currency (ie. Bitcoin)? Yes No

Did your marital status change during the year? Yes No

If yes, explain: _____

Were there any changes in dependents from the prior year. Yes No

If yes, explain: _____

Did your address change from last year? If so, please provide your new address. Yes No

Did you make estimated tax payments? Yes No

Did you change any bank accounts, or did routing transit numbers (RTN) and/or bank account number change for existing bank accounts that have been used to direct deposit (or direct debit) funds from (or to) the IRS or other taxing authority during the tax year? Yes No

Did you receive an Identity Protection PIN (IP PIN) from the IRS or have you been a victim of identity theft? If yes, attach the IRS letter. Yes No

Did you make any withdrawals from an IRA, Roth, myRA, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan? Yes No

If yes, were any withdrawals due to COVID-19? Yes No

Did you/your family receive any Federal stimulus money (Economic Impact Payment) in 2020 or 2021?
(Do not include NC Child Credit payment) Yes No

Received 2020 (EIP 1) \$ _____

Received 2021 (EIP 2) \$ _____

Did you receive a Paycheck Protection Program (PPP) loan? Yes No

If yes, did you apply for Paycheck Protection Program (PPP) loan forgiveness? Yes No

Did you receive emergency leave sick pay? Yes No

Did you receive emergency family leave wages? Yes No

Did you receive any special unemployment benefits or compensation under the Coronavirus Relief Act during the year? Yes No

If you are self-employed, were you unable to perform your self-employed activities due to coronavirus related care for yourself, your child/children under the age of 18; or another? Yes No